



Oracle Collaboration Suite (OCS) allows you to set up workflows or chains of approval that a document or file must go through before it can be posted to your Workspace. This document outlines how to utilize the workflow function through OCS Content Services.

How Do I Enable Workflow?

Workflow must be enabled for a Workspace through Content Services. You may access Content Services two different ways – through the **Content Services** portlet on the *Team Resources* page or from an existing Workspace. Directions for each are as follows.

Accessing Content Services from the Content Services portlet:

From the *Team Resources* page, you can access Content Services through the **Content Services** portlet. To do this:

1. Click on the Content Services portlet header (see Figure 1). The *Content Services* screen will be displayed.
2. Click on the workspace for which you would like to enable workflow and follow the steps outlined in the section below entitled “Enabling Workflow.”

Accessing Content Services from an Existing Workspace:

You may also access Content Services from an existing Workspace. To do this:

1. From the Team Resources page, select the “Enter Collaboration Workspace” link in the **Collaborative Workspace** portlet (see Figure 1). The *My Workspaces* screen will be displayed showing the Workspaces to which you have access.
2. Click on the desired Workspace. The Workspace page will be displayed.
3. Click on the “Library” link on the Workspace’s left navigation bar. The *Library* view will be displayed. Click on the “Content Services” button. The *Content Services* screen will be displayed. Follow the steps outlined in the section below entitled “Enabling Workflow.”

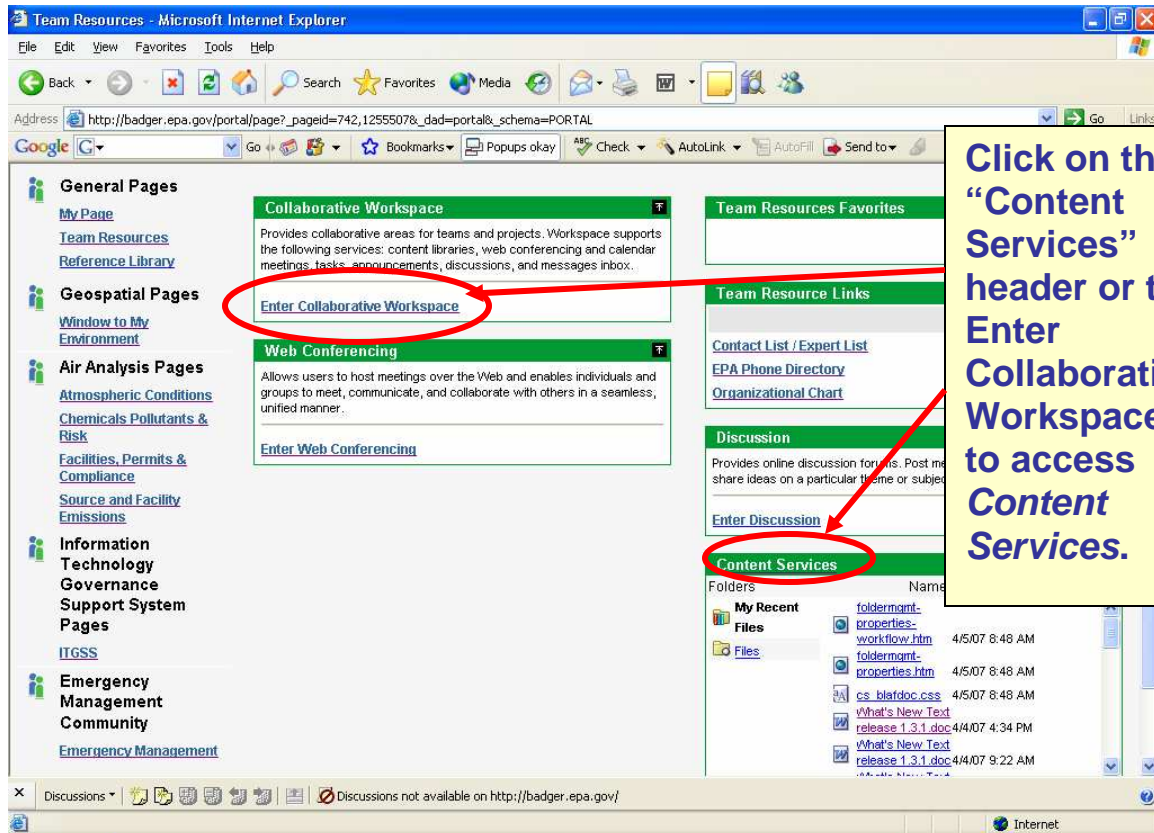


Figure 1 Accessing Content Services from the Team Resources page

Enabling Workflow

To enable workflow via Content Services, follow the steps outlined below.

1. Right click on the Workspace in which you would like to employ workflow and select "Properties.". A pop-up screen will be displayed; select the "Workflow" tab on that screen, as shown in Figure 2.



http://hawkeye.epa.gov - Folder Properties - Help Docs - Microsoft Internet Explorer

General Sharing Versioning Categories **Workflow** Help

Select an operation in order to view or modify its workflow settings

Select Workflow Operation

Select Workflow Operation	Workflow Name
<input type="radio"/> Check In	Not Configured
<input type="radio"/> Check Out	Not Configured
<input type="radio"/> Copy	Not Configured
<input type="radio"/> Upload Document	Not Configured

Inherit/Modify Settings for this Operation

☐ Inherit workflow settings from the parent folder

☐ Modify workflow settings as shown below

☐ Do not allow subfolders to modify this operation's workflow settings

Workflow Name Description

☐ Skip workflow process if submitted by an approver

Approvers

Select Name	First Name	Last Name
No data to display.		

☐ Automatically approve requests submitted by Approvers

Parameters

Name	Default Value	Prompt	Required
No data to display.			

OK Cancel Apply

Figure 2: Enabling Workflow

2. Select the “Modify Workflow Settings” button. The workflow name drop down menu will allow you to select the capability that best suits your Workspace. You may select:
 - a. Serial Approval: Responders approve or deny the request to post a document according to the sequential order you define for each approval; In other words, Approver 2 may only approve the document if Approver 1 has finished approving it.
 - b. Parallel Vote: All responders vote at the same time whether to approve or deny a request to post a document to the Library.
3. Select the box to skip the workflow approval process when documents are submitted by the approver, if appropriate.



http://hawkeye.epa.gov - Folder Properties - Help Docs - Microsoft Internet Explorer

Help

General Sharing Versioning Categories **Workflow**

Select an operation in order to view or modify its workflow settings

Select Workflow Operation	Workflow Name
<input type="radio"/> Delete	Not Configured
<input type="radio"/> Move	Not Configured
<input type="radio"/> Read Document	Not Configured
<input type="radio"/> User Request	Not Configured

Inherit/Modify Settings for this Operation

☐ Inherit workflow settings from the parent folder

☒ Modify workflow settings as shown below

☒ Do not allow subfolders to modify this operation's workflow settings

Workflow Name: Description:

☒ Skip workflow process if submitted by an approver

Approvers

Select Name	First Name	Last Name	
No data to display.			

☒ Automatically approve requests submitted by Approvers

Parameters

Name	Default Value	Prompt	Required
Justification <small>Requestor's justification for submitting the request.</small>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Request Timeout <small>Number of days before request expires.</small>	28	<input type="checkbox"/>	<input type="checkbox"/>
Escalation Period	4	<input type="checkbox"/>	<input type="checkbox"/>

Figure 3: Workflow Setting Options

How Do I Add Approvers?

To add an approver to the workflow, click the “Add” button on the right hand side of the screen, as seen in Figure 2 and follow the steps below.

1. Enter the name of the individual you would like to be an approver on the new screen.
2. Click the “Search” button to get the list of possible matches, as seen in Figure 4.
3. Click the “Select” button to add that person as an approver.
4. To remove a user as an approver, select the “Remove” button.
5. To add another approver, please repeat steps 1-3. Note: If you have selected “Serial Approval” the order in which you add approvers is the order in which the approvals will need to take place.



http://hawkeye.epa.gov - Find Users or Groups - Microsoft Internet Explorer

User Information

First Name: Jessica
Last Name: Neumann
User Name:
You can use the wildcards ? and *

Search Results

Select All | Select None

Select	First Name	Last Name	User Name
<input type="checkbox"/>	Jessica	Neumann	jessica_neumann@s...

Selected Users

Select All | Select None

Select Group or User Name

<input type="checkbox"/>	Jessica Neumann
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1 Users Selected

OK Cancel

Figure 4: Add Reviewer

How Do I Submit a Document for Approval?

When Workflow has been enabled on a Workspace, each time a document is uploaded to the Library, it will automatically be submitted for approval before it may be made available to other Workspace members. A message will be displayed on the Library screen alerting the user that their “file has been submitted for approval” as shown in Figure 5 below. For more information on uploading files, please see the **Workspace Library** help topic.

Current Folder: Library - Microsoft Internet Explorer

ORACLE Collaboration Suite Workspaces

My Workspaces

Information

Your request to upload 1 files has been submitted for approval.

Current Folder: Library

Filter By Name

Select items and ... (Add To View) (Copy) (Move) (Delete) (Notify)

Select	Name	Action	Status	Size	Last Modified By	Last Modified	Description
<input type="checkbox"/>	Trash				Jessica Neumann	Apr 4, 2007 9:20 AM	
<input type="checkbox"/>	What's New Text release...			36.5 KB	Jessica Neumann	Apr 4, 2007 9:22 AM	

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10.1.2.4.0 (070226, 1012)

Figure 5 Submitting Files for Approval



How Do I Approve Files Submitted for My Review?

Approvers may review and approve files that have been submitted to them through the Content Services screen. Instructions for accessing Content Services are provided in the sections above. To view submitted documents for approval:

1. Click on the Reports icon on the left side of the Content Services screen as shown in Figure 6 and then select the “My Requests” link. The requests pending your approval will be displayed.

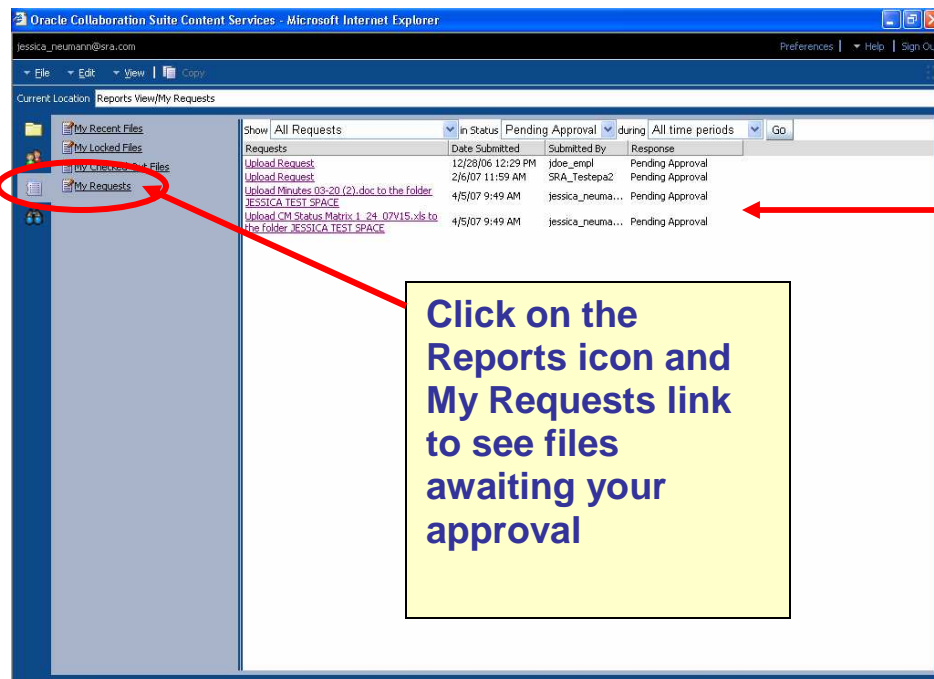


Figure 6 Approving Requests

2. To provide your approval or rejection, simply click on the request. The **Workflow Request Information** screen will be displayed as shown in Figure 7.



Name	Size	Location
You do not have permission to view the request targets.		

Workflow Type: Serial Approval
Submitted By: jdoe empl
Date Submitted: December 28, 2006 12:29 PM
Status: Pending Approval
Expiration Period: 28 Days
Escalation Period: 4 Days

Approver	Status	Responded Date
jessica_neumann@sra.com	Not yet responded	

Justification for Request
Justification not provided.

Approve Reject Close

Figure 7 Approving Files

3. To approve the request, click the “Approve” button. To reject the request, click “Reject.” When all approvers have approved the request, the file will be posted to the Library for other Workspace members to access.

Please Note: *Approvers are not notified by OCS when files are awaiting their approval. They must check Content Services to ensure they are aware of requests pending approval.*